

Terms

- **broad and extensive** – Refers to the significant component of an applicant's job duties.
- **investment management experience** – Refers to activities performed in achieving investment objectives across public (fixed income or equities) or private assets (e.g., real estate and private equity) classes for a financial services organization including: direct investing (buying and selling, execution and construction) or oversight of external managers within a portfolio. Also includes: Operational support (trade settlements, collateral management, data integrity, etc.), risk (investment or operational risk), compliance (monitoring systems, managing alerts, portfolio policy and procedures), asset allocation, performance and attribution, global governance (proxy voting, environmental social governance [ESG]), selecting and monitoring external managers.
- **major financial institution or firm** – Refers to a financial institution which supports and/or directs the investment of financial assets including public (fixed income or equities) or private assets (e.g., real estate and private equity). Some examples of this include: asset management companies, pensions, foundations, endowments, hedge funds, national or international banks, insurance companies, law firms, financial consultant firms (consulting for pensions, banks, national or international banks).
- **some experience** – Refers to a project where an applicant has led, coordinated or mentored staff on an individual project, analysis or evaluation of an investment related activity.
- **leading or coordinating professional staff** – Refers to directing a group of people in the same profession to achieve job tasks and duties.
- **large and varied investment portfolio** – Refers to a portfolio of financial assets including public (fixed income or equities) or private assets (e.g., real estate and private equity) held by asset management companies, pensions, foundations, endowments, national or international banks, insurance companies, hedge funds, etc.
- **investment program** – Refers to investment processes or activities across private or public asset classes that support the investment goals and objectives of the organization.